



FDMS Version 4.9 Release Notes

Release Date: July 25, 2015

Contents

Release Summary	1
Printer Friendly "View as PDF" Functionality.....	2
New Save Search Results Option: Export.....	4
Spell Check.....	4
Horizontal Scroll Bar in Left Panel	5
Improved Performance for Document Searches	6
Footer Pages	7
Docket POC	7
Phone Numbers.....	7
Update Note for Regulations.gov Viewable.....	8
Batch Processing	8
Large Docket Tree.....	8
Right Side Data Grid Batch Options.....	8
Right Side Data Grid Multi-Select.....	8
Work Queue.....	9
Expand the Size	9
Additional Enhancements.....	11
Defects Addressed.....	12
Known Issues in this Release.....	14

Release Summary

The FDMS.gov version 4.9 Release provides users with additional functionality including the introduction of a Printer Friendly “View as PDF” Functionality, Exports, and Spell Check. The primary additions and changes to the FDMS 4 software for this release include the following:


- Printer Friendly “View as PDF” Functionality
- New Save Search Results Option: “Export”
- Spell Check
- Horizontal Scroll Bar in Left Panel
- Improved Performance for Document Searches
- Footer Pages
- Docket POC
- Batch Processing
- Work Queue

Printer Friendly “View as PDF” Functionality

The “View as PDF” functionality was added to provide a printer friendly format for the following tabs:

- Document Details, Optional Details, Submitter Info:
 - All included in one PDF.
 - The PDF has headers for each tab.
 - This can be viewed for your Agency’s Documents or those of another Agency if you have permissions or the Document is posted.
 - The filename contains: “Document Metadata {Document _id} {date}{time}.pdf”.

Figure 1 – Document Details Printer Friendly "View As PDF" Functionality

Document Details:ERULE-2015-0013-DRAFT-0007


Document Details	
Docket ID	ERULE-2015-0013
Docket Title	Rule Writer Training Docket- Kelly
Docket Phase	Proposed Rule
Phase Sequence	1
RIN	1111-AA11
Document ID	ERULE-2015-0013-DRAFT-0007
Title	UDPATES
Number of Attachments	2
Abstract	
Document Type	PUBLIC SUBMISSIONS
Document Subtype	Public Comment
Comment on Document ID	ERULE-2015-0013-0001,0900006481952667
Comment on Document Title	Example FR Document- Kelly V.
Status	Pending_Post
Received Date	01/06/2015
Date Posted	
Posting Restriction	No restrictions
Reason Restricted	
Restriction Explanation	
Submission Type	
Number of Submissions	1
Document Optional Details	
Status Set Date	01/06/2015
Current Assignee	Admin, Agency Middle (ERULE)
Status Set By	V, Kelly (ERULE)
Comment Start Date	

- Attachments:
 - List of Attachments that includes the order, title, and posting restriction metadata fields.
 - The filename contains: "Attachment Metadata {Document _id}{date}{time}.pdf".

Figure 2 - List of Attachments Printer Friendly "View As PDF" Functionality

Document Attachments:ERULE-2015-0013-DRAFT-0007		
Order	Title	Posting Restriction
1	FDMS Test Document #5	No restrictions
2	Mr. UPDATE	No restrictions

- Docket Details:
 - Includes all metadata fields from the Docket Details Tab.
 - The filename contains "Docket Metadata {Document _id}{date}{time}.pdf".

Figure 3 - Docket Details Printer Friendly "View As PDF" Functionality

Docket Details:ERULE-2015-0013	
Docket Details	
Title	Rule Writer Training Docket- Kelly * ⓘ
Short Title	
Abstract	abstract
Type	Rulemaking * ⓘ
Subtype	Subtype * ⓘ
Subtype Level2	Subtype 2 ⓘ
Category	Pending ⓘ
Program	NA ⓘ
RIN	1111-AA11 * ⓘ
Keyword(s)	Appellate Decision, Petitions, Action on Appeal, User Fees, Certifications, Adjudication Notice, Aviation Economic Rules, Quality Clearinghouse, ⓘ
Petition Number	ⓘ
Bureau/Office	ⓘ
Organization	ⓘ
Internal Comments	
Legacy Id	ⓘ
Effective Date	ⓘ
Additional Field 1	ⓘ
Additional Field 2	ⓘ


New Save Search Results Option: Export

In earlier versions of FDMS 4, there is the button “Save Search Results” at the bottom of the left panel menu folder after a user ran a search and in the Right Side Documents Folder List. In the 4.9 Release, users now have two options when saving search results:

- Basic: Includes select metadata from the Results window (less than 10 fields) delivered instantly in a CSV file.
 - Results received immediately.
 - Select amount of metadata included.
- Full Export: All Document Metadata.
 - Results emailed within 24 hours.
 - Screen automatically populates email address from the user profile.
 - Users can enter a different email address if desired.

Figure 4 - New Save Search Results Option: Export

Save Search Results

 Save Search Results

☐ Basic: Includes select metadata from the Results window (less than 10 fields) delivered instantly in a CSV file.

☒ Full Export: All Document Metadata

The system will send you an email at the below address from your personal profile when the report is available. Please make sure the address is correct. If you do not receive an email within the next business day please contact the help desk.

Email Address: *

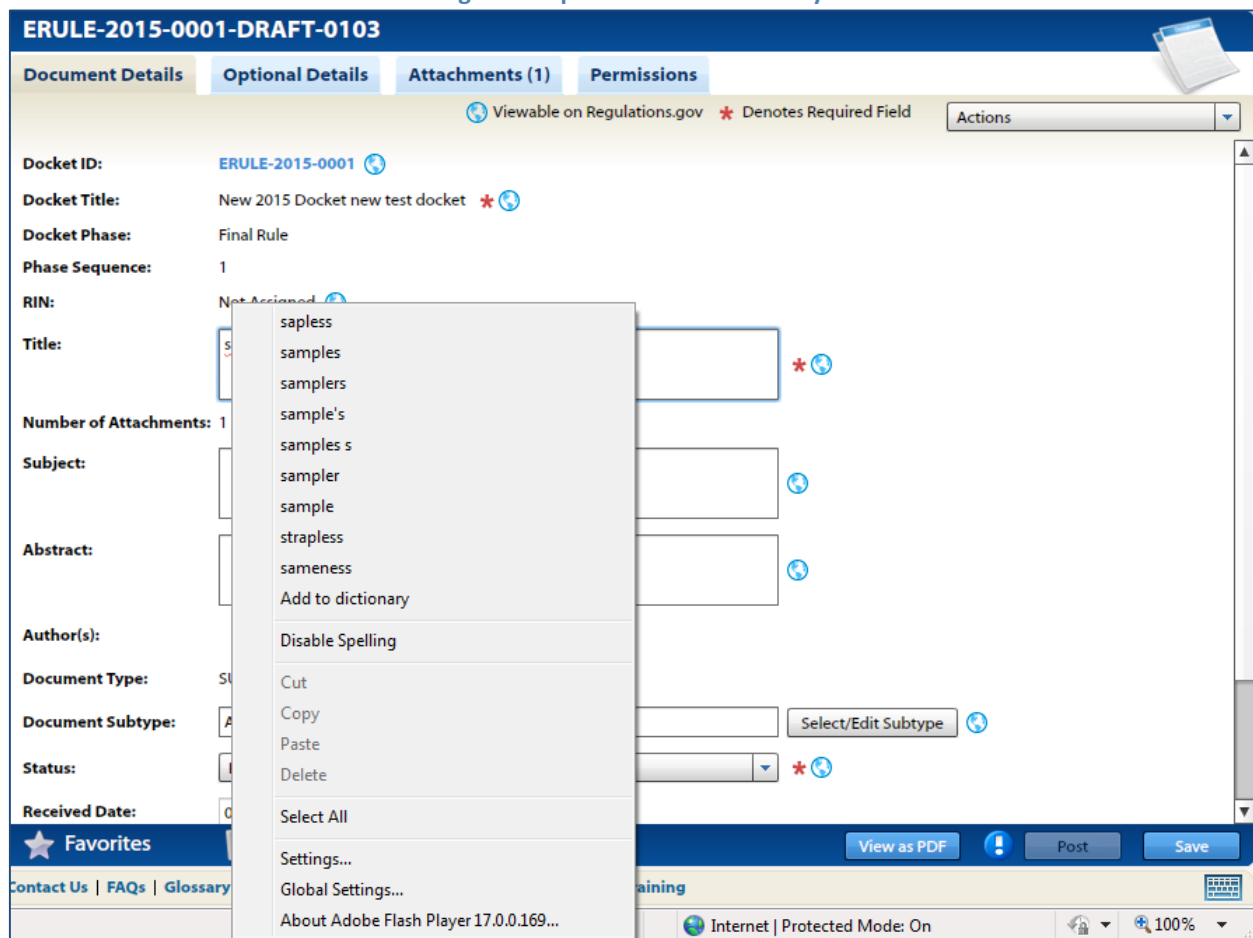
Spell Check

Spell check functionality was added to the following fields for the Docket, Document, and Attachment pages:

- Title
- Subject
- Abstract

When a word is misspelled it will be underlined in red, i.e. testingg. The user can right click for suggestions and choose from one of the suggested options, if available. The user has the option to “Add to Dictionary” if the word shows as misspelled but should not be. The Spell Check is enabled at the browser level and is stored on the user’s local computer. Therefore if a user clears their local cache, it will clear any entries that were added to the dictionary.

Figure 5 - Spell Check Functionality



Horizontal Scroll Bar in Left Panel

A horizontal scroll bar was added to the left panel in FDMS 4. Any list component that appears in the left panel such as Inbox, Recently Viewed etc. has this scroll bar. This functionality will help users to see additional info columns to the right without having to expand the size of the left panel, thus compressing the view of the information in the right panel.

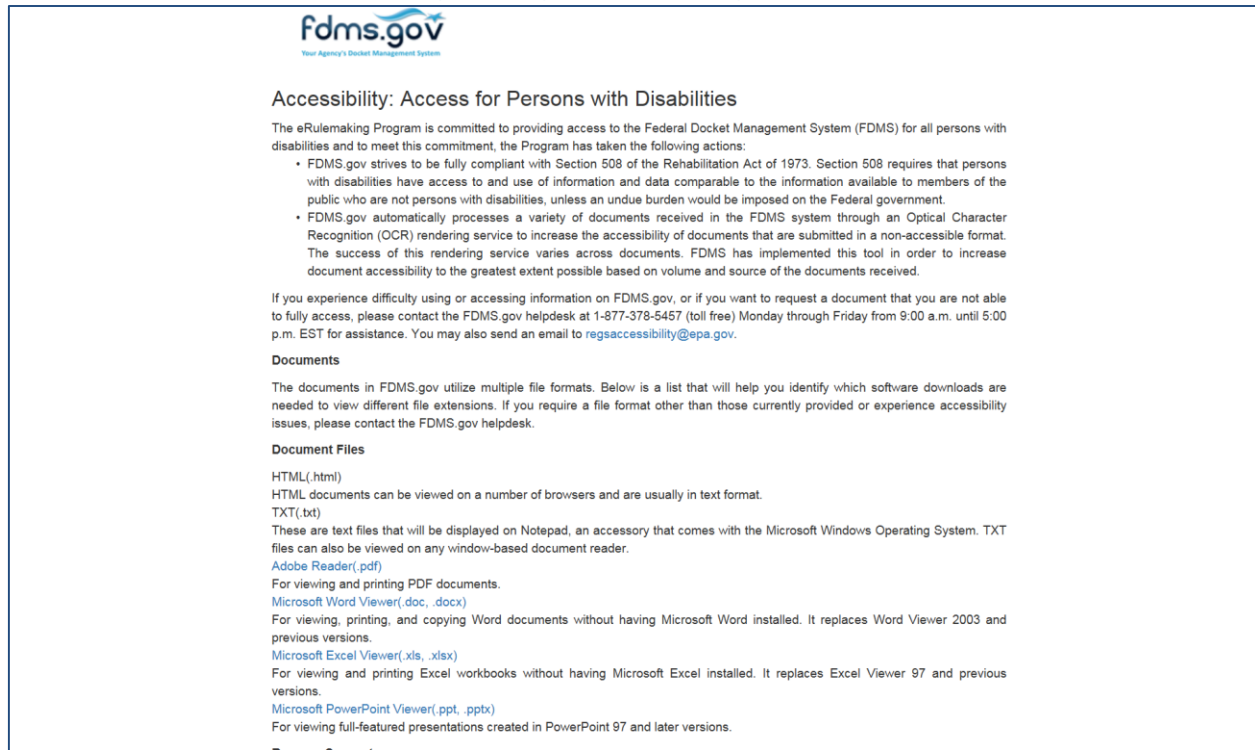
[illegible]

The full text index for Documents in FDMS was modernized and split up into separate Collections on the backend. These smaller “collections” of indexes will improve Document Keyword Search performance. Each Agency in FDMS will be included entirely in one of the smaller “collections” and configuration settings will be applied to the indexes to warm-up queries into cache to improve search time.

Footer Pages

The Footer pages were moved from FDMS 3 to FDMS 4. These pages appeared in FDMS 4 previously, however they were still coded in FDMS 3. During this process, the text for some pages have been updated and decisions were made to determine whether the Footer items should be publically accessible (on the Login page) or only appear after the user is logged into the application. The design of the footer pages was modernized for consistency with the FDMS 4 look and feel.

Figure 7 - Updated Footer Page Format



Docket POC

Phone Numbers

A mask was added and the font was changed for Phone Numbers on the Docket POC tab for consistency throughout the application. The dashes will be automatically displayed if the user does not enter them in the required format of xxx-xxx-xxxx. The fields affected are:

- Phone Number
- TDD Phone
- Fax Number

Update Note for Regulations.gov Viewable

An upcoming Regulations.gov release will include Docket POCs on the Docket Folder Summary pages. In preparation for this change, the Note at the top of the Docket POC page was updated to read the following:

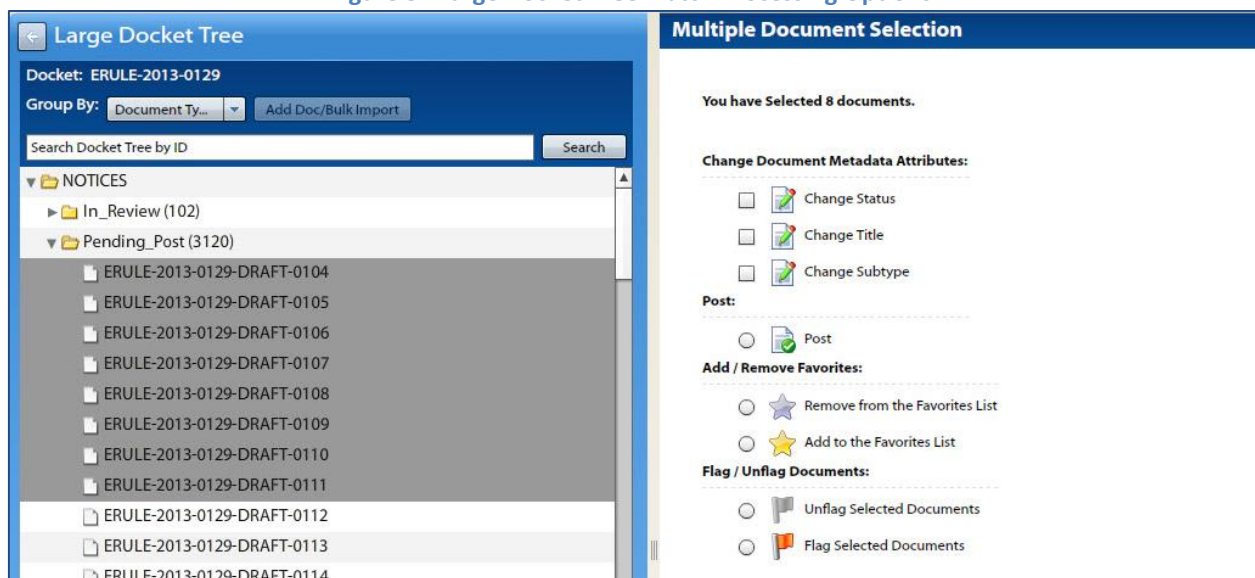
- ***Note: The first two Docket Points of Contact (POC) that have “View on Regulations.gov” checked will appear on the Docket Folder Summary Page for this Docket on Regulations.gov.**

Batch Processing

Large Docket Tree

The *Change Subtype* option was added on the Multiple Document Selection screen within the Large Docket Tree.

Figure 8 - Large Docket Tree: Batch Processing Options



Right Side Data Grid Batch Options

Previously when a user selected Documents in a data grid on the right side of the screen the Batch Options only showed the Change Title option. Smart logic was built into the system to enable the Change Status option if the status is the same for all Documents selected. The Change Subtype option is enabled if the Document Type is the same for all Documents selected.

Right Side Data Grid Multi-Select

CCB # 245

Batch Actions: Currently, the right side list of Documents does not allow a user to select multi-

select Documents, therefore, the Batch Actions in the Batch tab only works on the entire set of search results, not on subsets, sorted views of the results. This request adds the ability to select two or more Documents from the right side folder contents list and perform batch operations on those selected Documents.

NOTE: The Batch Actions will not be available at the Phase Sequence folder level. This can be added as a feature for a future enhancement based on user feedback.

Work Queue

To help with the performance of loading the Home Page Left Side Menu Counts, the Work Queue menu will only display in the left panel menu for users whose Agency is actively using the Work Queue. The Work Queue count queries were updated so they will only run when the user is an Agency Admin or Docket Manager and only if the agency is using the Work Queue.

NOTE: If your agency is interested in using the Work Queue, please contact the Help Desk for further information.

Expand the Size

The Work Queue documents list was updated to display a maximum of 20,000. Previously users could only view the first 10,000 Documents in their Work Queue.

Figure 9 - Work Queue: Processing 20,000 Results at a Time

Work Queue

Docket

Document

Filter: OFF

Search Documents

	ID	Title	Current Assignee	Type	Status
	ERULE-2010-0010-DRAFT-0004	Copy (55) of DRAFT 3 ...		NOTICES	Pending
	ERULE-2010-0036-DRAFT-0001	test patch 4	Admin, Agency Middle (ERULE)	NOTICES	Draft
	ERULE-2010-0036-DRAFT-0002	test patch 4	Admin, Agency Middle (ERULE)	RULES	Pending
	ERULE-2010-0036-DRAFT-0003	2	Admin, Agency Middle (ERULE)	NOTICES	Pending
	ERULE-2010-0041-DRAFT-0035	Comment from test ...	S, Christopher (ERULE)	PUBLIC SUBMISSIONS	Pending
	ERULE-2010-0041-DRAFT-0041	test with Pat	S, Christopher (ERULE)	PUBLIC SUBMISSIONS	Pending
	ERULE-2011-0003-DRAFT-0003	Comment from David...	Hering, AL Stick (ERULE)	PUBLIC SUBMISSIONS	Pending
	ERULE-2011-0003-DRAFT-0004	Comment by Maria ...	Manager, Docket (ERULE)	PUBLIC SUBMISSIONS	Pending
	ERULE-2011-0003-DRAFT-0005	Comment from Trisha...	Manager, Docket (ERULE)	PUBLIC SUBMISSIONS	Pending
	ERULE-2011-0003-DRAFT-0008	FDMS Test Document...	Manager, Docket (ERULE)	PUBLIC SUBMISSIONS	Pending

Count: 20000

Last Refreshed:07/24/2015 12:56:03 AM

Save Search Results

Additional Enhancements

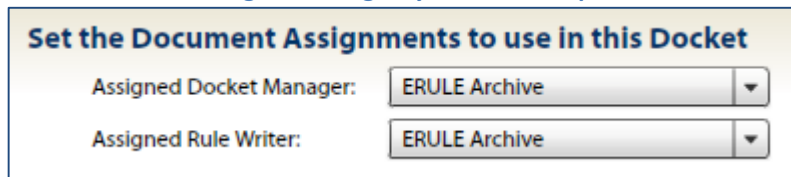
Deduplication

- The Font Style was updated for consistency throughout the Deduplication pages.

Docket Management

- An Archive group was added for existing agencies and will be created for any new agencies day-forward. The group will be available on the Assigned Docket Manager and Assigned Rule Writer dropdowns.

Figure 10 - Agency Archive Group



Set the Document Assignments to use in this Docket

Assigned Docket Manager: ERULE Archive

Assigned Rule Writer: ERULE Archive

Document Management

- The Re-assign action is no longer available on Posted and Withdrawn Documents.
- Removed the Posted and Withdrawn Status from the Assignments Tab.
- When a Document is posted, the status assignee is now set to NA.

Figure 11 - Status Assignee Set to NA



ERULE-2006-0001-0011

Document Details Optional Details Attachments (0) Permissions

Viewable on Regulations.gov Denotes Required Field Actions

Status Set Date: 06/22/2015

Current Assignee: NA

Status Set By: Admin, Agency Middle (ERULE)

Login Page

- Functionality was added to allow the System Administrator to post an Alert Message to the Login page without the need to "bounce" the application servers, thus allowing for more timely and frequent messages when necessary.

User Profile

- A mask was added for the phone number fields on the User Profile - My Info screen. The dashes will be automatically displayed if the user does not enter them in the required format of xxx-xxx-xxxx for the following fields:
 - User Info's Telephone
 - Supervisory POC Information's Telephone

Defects Addressed

Advanced Search

- Users reported an issue when searching for several subtypes using Advanced Search. If a user selected any of the subtypes *Publication; XXX* values, only documents with the subtype *Publication* were returned in the search results. The issue was due to the use of the semi-colon within the subtype value which treated the subtype as 2 separate entries.
 - For example, the Advanced Search treated *Publication: Copyrighted Materials* as *Publication* and *Copyrighted Materials*. Since there was no actual subtype *Copyrighted Materials*, nothing was returned in the search for that match.
 - We updated the affected subtypes throughout the system to remove the semi-colon and replaced it with a dash.

Assignments/Permissions

- In a non-standard Docket when the Assigned Rule Writer was changed, that user was not granted permissions even though it appeared as if the user had write permissions. The Assigned Rule Writer has to be given write permissions manually.
 - This was corrected so that in a non-standard Docket the Assigned Rule Writer is given write permissions automatically.
- When the assigned Docket manager was NA (appears as blank in Assignments tab) and the permissions were changed to non-standard, users attempting to access permissions tab on both the Docket and Document level were logged out of the system. Further, when the user logged back in, the Docket/Document did not have a permissions tab.
 - Since some agencies have NA as the default ADM when creating new Dockets, this issue was corrected.

Attachment Details

- Attachment Copy/Move was throwing an exception when there was an apostrophe in the Title.

Batch Processing

- The Batch Processing Title change limit was set to 250 characters rather than 400 characters, so users received an error if they entered 400 characters.
 - The limit is now set at 400 characters.

Bulk Extract

- The Bulk Extract parameters were not cleared if they were in the same job.
 - For example, if the first bulk extract was submitted with a Begin date and the second extract is submitted without begin date, and both requests ran in the same job, they would both run with a Begin date.

Docket POC

- Creating or editing a new POC for the following 3 values for States fields were not saving correctly because the column was set to display 16 characters.
 - District of Columbia
 - Northern Mariana Islands
 - US Virgin Islands
- The column was expanded so these three values are saving correctly.

Docket Tree

- When the Docket tree was grouped by Document Type, the Document Type folder did not display the count.

Inbox

- When a user logged in for the first time in a given day, all Menu Item counts were displayed. If the session was timed out or a user logged out/closed the browser and logged back in, the menu counts for Inbox and Work Queue were not loading.

Permissions

- When there were enough users listed in the Permissions Tab that triggered the Permissions Table to have a scroll bar, clicking the Delete button for any user made all of the other users disappear from the table.

Records

- The declaration of Public Submissions uses the submitter info First Name, Last Name and Organization to establish the Record's Author. When these were missing, the system was not using the Docket's Default Author to determine the Record's Author as expected.
- When a Document was Declared and subsequently Un-Declared, an agency was not able to delete this Document. The agency had to contact the FDMS Help Desk to request that a developer delete it from the backend.
- The Document Records Tab presents fields from the Record that users with write permissions can edit. However, the save button was disabled so the changes could not be saved.

Search Filters

- On the Docket Tree Folder data grids, the Search Text entered by a user was not resetting when the user navigated away from the folder.

Select User/Group

- On the Docket Assignments tab, changing the status assignment was not working when the 'Assign to me' option was selected.
- The select users/groups queries for recently used users/groups and contacts resulted in an error when the list of recently used users/groups or list of contacts was empty.

- On the Select User Group dialog users could not select the last user in the recently used list when that list included one or more groups.

Self Registration

- In the FDMS 4 Self Registration screen, a person was able to create a user ID using mixed case letters, causing confusion later since the user ID is case sensitive.
 - For example, if a user ID existed in all lowercase letters, another person was able to self register using the same user ID with uppercase letters.
 - The issue was corrected to match previous FDMS 3 functionality. If a user enters a user ID with uppercase letters, the application automatically converts the user ID to all lowercase letters and will not allow creation of a duplicate ID.

Work Queue

- In the work queue, the Document Center Summary lists all groups that the user belongs to. This was including groups that are internal to FDMS, not just those defined by the agency.
 - The internal FDMS groups are no longer shown on the Document Center Summary.
- When a user was deleted from the Document Center Summary table, the whole table went blank.

Known Issues in this Release

- None noted.